

APPENDIX F. HOW DO I CONDUCT A TEAM LESSONS LEARNED SESSION?

Cast a net for management lessons learned from time to time, especially as one phase is ending and another is to begin. A balanced process will gather both positive and negative perceptions and experiences of the team's work to date. An orderly and fair process will ensure that all participants have a chance to contribute. Below are ways to design a well-structured process so as to bring about those results.

F.1. Preparing for the Lessons Learned Session

- Give the group time in advance to collect their thoughts.
- Typical questions might be: "What worked well during this phase?" "What would you change if you were in charge?" Customize the topics to reflect what is appropriate in your organization and at this particular point in your CVISN work.
- Reserve a meeting room. Have blank flip charts and markers available. Post the topics for all to see.
- If you have a camera on hand take photographs of the resulting flip charts (one at a time). If you later scan the photographs (or used a digital camera) you will then have an electronic record that is easy to distribute via e-mail.

F.2. Guidelines for Structured Brainstorming

(These steps and precautions will ensure that the session remains under control and does not collapse into a chaotic free-for-all, nor be dominated by the person with the loudest voice.)

- Assign a facilitator and a scribe. For large groups (15 or more) use two scribes and two different flip charts to keep the process moving smoothly.
- Review the process guidelines with the participants.
- Review the topic questions to be worked on.
- Brainstorm items and record them on the flip chart paper.
- Enforce the round-robin method – one item per person at a time. The facilitator goes around the group again and again; each participant conveys one of their ideas per turn. No pressure – a person may say "pass".
- Free wheel; don't hold back any ideas even if they seem silly at the time.
- Minimize discussion during brainstorming! That comes later.
- Ensure that ideas are not evaluated when they are initially presented, but do give an opportunity for clarification and questions about an item before items are combined and the voting occurs.
- Hitchhike – build on the ideas of others.
- Suspend judgment – no one is allowed to criticize or applaud anyone's idea; not a groan or a grimace.
- Folks hold war stories to one minute please.
- Post the flip chart paper around the room as needed to accommodate everything.

The next section describes a process for consolidating and prioritizing the above free-form input, in order to produce a coherent prioritized summary.

F.3. Guidelines for Prioritizing and Multivoting

(These steps will ensure that a consensus-based written report emerges from the session.)

- Clarify as necessary. The person who contributed a puzzling item should initially explain the item but others may join in the discussion to help refine and focus the wording.
- Number each item from “a” through “z”, “aa through “zz”, ...
- Ask the team to suggest grouping of related items.
- Check for agreement on grouping via an informal voting procedure: thumbs-up: “yes”; thumbs-down: “no”; thumbs-sideways: “can live with it”. (Counts as “yes”.) If one person disagrees, don’t combine. Mark up the flip charts to group items agreed as similar.
- Finally, ask each member to vote priorities on the grouped items. If there are lots of items (more than about 10) then have everyone silently pick their top 25% and mark those (called “multivoting”). Like magic the high-priority items will receive the most checkmarks.
- Record the number of votes along side each item.
- After the lessons learned session, re-order the list by number of votes cast for each, and distribute the final list.

After the process is completed and results have been reported, the team may want to pick some specific items to work on in order to prevent or ensure their occurrence during the next phase.

Periodically, **share your lessons learned** with other states and FMCSA. There have been many instances of formal lessons learned reports; some are discussed in Chapter 7 of the *CVISN Guide to Program and Project Planning* [4] and cited in the references of that document.

For more background on structured brainstorming and multivoting, please see Reference [22].